

Harness the power of intelligent PDFs.

Drive transformation by leveraging PDFs to unlock data.



Over the last two years we have seen a wave of investment aimed to keep business moving and prepare organizations for the changing workplace. Digital technologies have become critical to every corner of the business from the boardroom to the back office, to the sales desk to the loading dock.

Engagements with every customer and employee are digital first and experience expectations are sky high, a fact confirmed by 87% of senior executives who believe we are in a new world where digitally rewired customer expectations now define fulfillment.¹ As organizations move forward, it's critical to refine and focus digital transformation efforts where they will have the biggest return on investment.

As of last year, a mere 10% of companies view technology as a means of saving, while 90% of companies are investing in technology to keep up, differentiate, or relaunch their business.²

With digital experience as paramount, data has become a core asset for today's businesses. The cloud now rules, and artificial intelligence (AI) and machine learning (ML) are being leveraged to automate processes.

Digital transformation starts with digitization, but requires changes to culture, processes, and workforce to drive better outcomes, including better customer experiences. A recent Harvard Business Review article described digitization as "...mostly about enabling business as usual and 'staying in the game,' while the latter [digital transformation] is about building real, long-term competitive advantage to succeed."³

While most companies have successfully navigated the last two years and digitized their critical business processes, it's becoming clear that while digitization is a critical part of digital transformation, these two initiatives are not equal.

Where do we go from here?

Savvy CIOs are taking a hard look at how to advance beyond basic digitization to transform their business. They are examining existing business processes and optimizing and transforming operations and processes through deeply coordinated shifts in technology, culture, and workforce. That's certainly a mouthful and equally as certain, no easy task.

At Adobe, we're seeing market-leading organizations accelerate business processes and improve experiences by leveraging [digital document workflows](#). That's right, digital document workflows.

Open the doors on any organization and dig into their critical business processes and you'll see data flowing and bits being exchanged. In the critical interactions of any one process—be it related to customer relationship management (CRM), enterprise resource planning (ERP), sales force automation (SFA), or human capital management (HCM)—valuable data and critical process touchpoints often pivot around digital documents.

Organizations from banks to life science companies to governmental agencies, are re-examining the document journey from creation to collaboration, signature, and archival and retrieval. They're finding that PDFs viewed as dynamic information, not static content, are a key enabler of digital transformation.

Making it real—HR onboarding

As an example, take employee onboarding at an international technology company. The internal HR talent coordinator is required to pull together a diverse set of documents for signature, review, and reference for the incoming new hire. The documents must be assembled, tracked, and checked to make sure they are accurate to get the new hire in the front door.

There are two very distinct approaches for transforming this process from paper to digital. The first simply makes a digital copy of the paper artifact. The talent coordinator remains responsible for pulling, sending, tracking, filing, shipping, and

¹ "2022 Digital Trends Experience Index," Adobe, 2022.

² "How COVID-19 has pushed companies over the technology tipping point—and transformed business forever," McKinsey & Company survey, October 2020.

³ "Digitizing isn't the same as digital transformation," Harvard Business Review, March 2021.

securing all essential digital documents. Now digitized, this process has not been transformed. While there are digital copies of the documents, the talent coordinator retains a heavy coordination role with inherent risk of errors, delay, and noncompliance.

With the right tools, however, an organization can take a digital-first approach that fundamentally improves the experience both internally and externally. The talent coordinator could leverage a structured document workflow. As the workflow is initiated, the system pulls the recruit's relevant information from the HCM system, merges it into the correct forms based on hiring location, role, department, and position level and prepares an onboarding packet. Approval routing is automatically determined and initiated.

Once approved, the candidate receives a branded, complete PDF package with prefilled forms. The talent coordinator's much friendlier task is to provide any supplemental information, review the documents, verify their identity, and electronically sign, and then submit the document package. Status, reminders, and tracking are centralized and automatic. The result is a better experience across the board. The talent coordinator can use the free time to answer culture or workplace inquiries or handle other pressing HR tasks. The new hire is free to focus on their new position instead of chasing paper.

The humble PDF

All of this can be enabled today through PDF technology. It doesn't require new technology stacks and processes. PDFs are the #1 file format for business documents—in fact 40% of documents passing through Outlook are PDFs. Unlocking the intelligence contained in these documents can be more valuable to an organization than all their outstanding shares, or gold and cash.

PDF is the top business file format because it is ubiquitous, can be read on any device or browser, and can be read by machines. The PDF data format and content is locked in place, exactly as an organization has designed it. No longer solely a static image, the PDF has become leverageable data. Some of an organization's most critical insights live inside PDFs, distributed across systems and storage.

This data enables a better understanding and service of customers, both internally and externally. It may contain contract data, personally identifiable information (PII), sales history, inquiries and more. It can be used to inform and create impactful experiences that offer faster, personalized service. Data in PDFs can be harnessed to serve as the building blocks of a transformed business process. Unlocking that intelligence helps an organization realize full efficiency—producing direct impacts on modern workplace productivity, process automation, and connected experiences.

⁴ Gartner's Data Quality Market Survey, 2018.

Harnessing intelligent PDFs

While PDFs are ubiquitous, not all PDFs are built the same. What is required of the humble PDF to go from an easy, reliable, and consistent presentation format to an intelligent data source? First and foremost, it needs to be built securely. It is critical to ensure and maintain secure, accessible, and compliant data from SOC 2 Type 2 through GLBA.

To take full advantage of PDFs, organizations need to ensure device independent, optimized experiences. A high-fidelity PDF ensures accurate, trusted output—providing optimized consumption experiences and enabling robotic process automation (RPA) and low-code automation.

Businesses routinely experience critical errors automating low-quality documents. In both healthcare and insurance, claims administration relies on accurately reading and processing submitted forms. If scans or low-quality PDF documents are difficult to read, robotic process automation (RPA) will be operating on bad and/or missing data such as being unable to identify the insured or rejecting a claim due to inaccurate claim dates. Best case, these would trigger an exception review process—costly in itself—worst case the claim is rejected and requires a customer service case to resolve.

Poor data quality is responsible for significant losses every year. Five years ago, Gartner found that organizations believed poor data quality was responsible for “an average of \$15 million per year in losses.”⁴ Imagine what the cost is today.

Using native integrations and APIs to embed best-of-breed PDF processes into business applications enables organizations to rapidly and cost-effectively scale automation. Embedded PDFs allow for accurate rendering, customizable user experiences, and analytics, giving an organization control over how PDF intelligence is managed, shared, viewed, and consumed.

Organizations also need AI and ML tools to make PDFs into intelligent documents. From extracting content fragments from contracts to personalizing document creation from systems of record and automating the accessibility tagging of documents, these tools are required to extract intelligence from the unstructured data.

Working collaboratively with our customers from enterprises to small and medium businesses (SMBs), Adobe is developing the only modern PDF infrastructure that provides the foundational building blocks for document workflows and business process automation that are secure, compliant, and automation ready. With an Adobe Acrobat PDF, you can:

- Easily batch-process and [sign PDFs](#).
- [Extract](#) and repurpose data within PDFs.
- Deliver exceptional customer experiences with high-fidelity PDFs for easy viewing and signing across devices anytime, anywhere.

- Mitigate potential risks with security and compliance built into PDFs automatically.

PDFs from Adobe help ensure that the ad hoc content created across the organization is consistent and fully leverageable. Using the Adobe Document Generation API across HCM, CRM, and ERP systems, organizations can reduce the need for managing hundreds of templates to standardize on the best-of-breed PDFs. By leveraging the Adobe PDF Extract API, insights can be captured from stored documents to fully realize their potential. From contract clauses to market research, taking documents from unstructured content to actionable insights is a sure path to realizing full organizational efficiency.

The PDF future is bright.

No matter your industry or business, digital is around every corner. As organizations prioritize investments to continue the digitization momentum achieved in the last few years, leading organizations are taking a hard look at the art of the possible, via PDF.

What if every document created by your organization or systems was a high-fidelity, data-rich, accessible, and [secure PDF](#)? From creation to analysis, an intelligent PDF can help businesses make better decisions based on artificial intelligence and intelligent document services. This moves the needle by harnessing the ocean of unstructured content into actionable insights and translates into cost savings, efficiency gains, and most importantly better experiences across the board.

Organizations leveraging Adobe Acrobat solutions are seeing the payoff. A recent Forrester study shows an

ROI of 519%



30% faster transactions



47% more efficient back-office work



45% better customer retention and loyalty⁵

Let Adobe help you establish the digital building blocks that drive business transformation, wherever you are on your journey. To learn more, contact your Adobe team.

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⁵ "Adobe Acrobat Sign Integrated with Acrobat Drives Better Business Value," a commissioned spotlight conducted by Forrester Consulting on behalf of Adobe, January 2022.

